

Excel Dashboard Steps (1,2,3,4)

1. KPI Cards Setup

- Create KPI summary sheet.
- Calculate Total Customers, Active, Inactive, Churned, Revenue, etc.
- Insert Text Box → type label → press "=" → link KPI cell.

2. Charts Creation

- Active vs Inactive vs Churned → Pie Chart
- Revenue by Country → Column Chart
- Revenue by Plan Tier → Bar Chart
- Monthly Signup Trend → Line Chart
- Monthly Active Customers → Line Chart

3. Slicers

- Insert Slicer → choose fields like Country, Plan Tier, Industry, Signup Month.
- Format slicers (columns, style, alignment).
- Connect slicers to all pivot tables: Slicer → Report Connections → tick all PivotTables (KPIs + Charts).

4. Final Dashboard Formatting

- Arrange KPI cards on top.
- Place charts neatly.
- Put slicers on the side or top.
- Apply colors, borders, and alignment.